

MODULE 6 Getting Off to the Right Start in a Formal Ethics Consultation Meeting


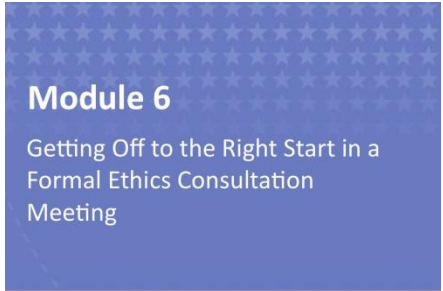
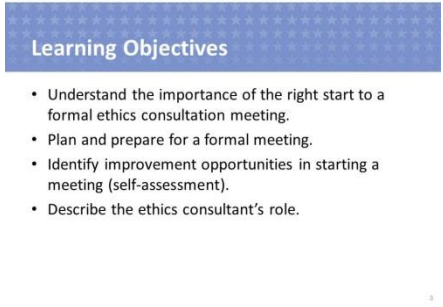
OBJECTIVES	<p>By the end of this session, participants will be able to:</p> <ul style="list-style-type: none"><input type="checkbox"/> Understand the importance of the right start to a formal ethics consultation meeting.<input type="checkbox"/> Plan and prepare for a formal meeting.<input type="checkbox"/> Identify improvement opportunities in starting a meeting (self-assessment).<input type="checkbox"/> Describe the ethics consultant’s role clearly and succinctly.												
RESOURCES	<p>For the session:</p> <ul style="list-style-type: none"><input type="checkbox"/> Props for “Murphy’s Law” enactment: beeper, handheld tape recorder<input type="checkbox"/> Slide presentation, laptop, and projector<input type="checkbox"/> Flip chart (and markers) or whiteboard (and whiteboard supplies)<input type="checkbox"/> Participant Handouts<input type="checkbox"/> CASES pocket cards												
PREPARATION	<ul style="list-style-type: none"><input type="checkbox"/> Gather training resources and read through the session plan.<input type="checkbox"/> Ensure that the laptop and projector are functioning properly.												
OUTLINE	<table><thead><tr><th>SECTIONS</th><th>DURATION (MINUTES)</th></tr></thead><tbody><tr><td>1 Introduction</td><td>3</td></tr><tr><td>2 “Murphy’s Law” Enactment</td><td>10</td></tr><tr><td>3 Preparing for the Formal Meeting</td><td>12</td></tr><tr><td>4 “Elevator Speech” Activity</td><td>30</td></tr><tr><td>5 Takeaways</td><td>5</td></tr></tbody></table> <div>Total session time60 minutes</div>	SECTIONS	DURATION (MINUTES)	1 Introduction	3	2 “Murphy’s Law” Enactment	10	3 Preparing for the Formal Meeting	12	4 “Elevator Speech” Activity	30	5 Takeaways	5
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U.S. Department of Veterans Affairs

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1. Introduction (3 minutes)

<p>Slide 1</p> 	<p>NOTE: Have this slide up before the session begins.</p> <p>CLICK when you are ready to begin.</p>
<p>Slide 2</p> 	<p>SAY:</p> <p>In this session, we discuss strategies for starting a formal ethics consultation meeting that support the consultant's ability to manage interpersonal dynamics and achieve the objectives of the meeting. With good preparation and practice, ethics consultants can get the meeting off to the right start and keep it on track.</p> <p>It's important to note that while the strategies we will discuss are essential at the beginning of a meeting, interactions and group dynamics are not always linear, so some of these strategies may be needed later in the meeting.</p> <p>CLICK.</p>
<p>Slide 3</p>  <ul style="list-style-type: none"> • Understand the importance of the right start to a formal ethics consultation meeting. • Plan and prepare for a formal meeting. • Identify improvement opportunities in starting a meeting (self-assessment). • Describe the ethics consultant's role. 	<p>SAY:</p> <p>By the end of this module, you will be familiar with the tools and techniques you need to get a formal ethics consultation meeting off to the right start, and you will have created a brief speech you can use to describe your role as an ethics consultant.</p> <p>CLICK.</p>

Slide 4

CASES Link

S **SYNTHESIZE** the Information

Determine whether a formal meeting is needed

- Engage in ethical analysis
- Identify the ethically appropriate decision maker
- Facilitate moral deliberation among ethically justifiable options

SAY:

Please take out your CASES pocket card. It outlines the major steps and substeps of CASES, which is the IntegratedEthics model for performing ethics consultation.

This module falls under Step 3 of the CASES approach, “SYNTHESIZE the Information,” and links to the first substep, “Determine whether a formal meeting is needed.” All 3 bullet points in that substep will be addressed in this module.

CLICK.

2. “Murphy’s Law” Enactment (10 minutes)

<p>Slide 5</p> <p>Group Activity Instructions Handout 6.1</p> <ol style="list-style-type: none"> 1. Read Case History and Cast of Characters (pages 2 and 3 on handout). 2. Take your positions. 3. “Action.” 	<p>NOTE: Display this slide throughout the activity.</p> <p>SAY: We’re going to start with a brief bit of theater. We will be using Handout 6.1: Murphy’s Law in a Formal Ethics Consultation Meeting—Playbill.</p>
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ACTIVITY: Coping with Murphy’s Law at a Formal Ethics Consultation Meeting (Refer to Handout 6.1)

Groups	<p>Assign cast roles and set the stage before the module session begins.</p> <p>Arrange 2 groups: the cast of characters and the audience.</p> <p>The cast consists of 7 characters. If there are not enough participants to play all the parts, some participants may play 2 parts.</p>
Time	<p>2 minutes for instructions</p> <p>2 minutes for enactment</p> <p>6 minutes to debrief with the large group</p> <p>Total: 10 minutes</p>
<p>Before the Activity: Give the following instructions</p>	<p>SET THE STAGE:</p> <ul style="list-style-type: none"> • Ask all volunteers to read through the script and note their lines. • Give Dr. Allen a beeper, and have Dr. Pierce and Dr. Allen stand off stage. • Have 3 of the 4 family members sit in chairs. • Give Ira Williams a handheld tape recorder. <p>When the audience is seated...</p> <p>SAY: Everyone, please take out Handout 6.1 and read the Case History and Cast of Characters on pages 2 and 3.</p> <p>Now we are ready to begin. Audience, please follow along on page 3 of Handout 6.1. Dr. Pierce, I believe you have the first line. Ready, set, action!</p>
<p>During the Activity: Monitor</p>	<p>Monitor time and ask the cast to wrap up after 2 minutes.</p>

ACTIVITY: Coping with Murphy's Law at a Formal Ethics Consultation Meeting
(Refer to Handout 6.1)

**Following
the Activity:**
Debrief

Wrap up the activity by giving feedback to the group on their great effort and asking for a round of applause.

CLICK to move to the next slide and begin the discussion.

Slide 6

Discussion: A Critical Review of the Meeting

**SAY:**

The beginning of the meeting you just saw had a lot of room for improvement. Let's talk about what went wrong.

ASK:

What happened that *shouldn't* have happened? What did people say or do—or what *didn't* they say or do—that undermined the meeting? You may read lines from the script to illustrate your answers.

NOTE: Draw a vertical line down the center of the flip chart or whiteboard.

ELICIT ANSWER(S) and record them in brief notes on the left half. Answers may include details such as:

- The ethics consultant was late.
- Confusion.
- Not enough chairs.
- People interrupted each other.
- Lamar challenged the ethics consultant's authority.
- Dr. Allen used jargon; read from records.

SAY:

You might say that in the play, "Murphy's Law," everything that could have gone wrong, did! The play doesn't set a good example for us, but this "bad practice" example highlights some problems that arise at the very beginning of a meeting where conflict might be anticipated.

ASK:

Now let's look at what Dr. Pierce, the ethics consultant, could have done to prevent Murphy's Law from taking over her meeting. Any ideas?

ELICIT ANSWER(S) and record them in brief notes on the right half of the flip chart/whiteboard. Answers may include a broad variety of suggestions. For example:

- The ethics consultant should be the first to arrive.
- Ensure enough chairs.
- Lead the introductions.
- The ethics consultant should introduce him- or herself and have others introduce themselves.
- Talk about ground rules.

NOTE: Stop recording when there is no more space on the

	<p>flip chart or whiteboard.</p> <p>SAY: You've identified a number of good strategies and could probably identify more if we continued. We'll see these strategies come up again as we work through this module.</p> <p>Although a lot of the challenges arising in a formal meeting cannot be avoided, many can be prevented if the ethics consultant sets the stage effectively at the beginning of the meeting.</p> <p>CLICK.</p>
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3. Preparing for the Formal Meeting (12 minutes)

Slide 7

Planning

1. Determine if a formal meeting is needed.

Criteria

- Parties are not confident they have been heard.
- Parties don't understand others' points of view.
- Many different parties are involved.

Considerations

- Will it delay the process?
- Will it be efficient?
- Will participants voice their points of view?
- Do you have all the facts you need?

SAY:

We'll start by looking at what the ethics consultant should do before the meeting. Please turn to **Handout 6.2: Planning and Preparation for a Formal Ethics Consultation Meeting**.

Your first step is to decide if a formal meeting is actually needed. Many consultations can be conducted without a formal meeting.

Essentially, a formal meeting is a way to bring all the relevant parties together when parties are not confident they have been heard or parties don't understand others' points of view. Or perhaps there are so many different parties involved that to have them share their views with each other you need to get them together in a room.

Even when these criteria apply, you need to consider whether there is another way to share, clarify, and perhaps resolve differences in the parties' points of view. A formal meeting can take time that delays the process and consumes more work hours than it's worth, especially if the participants are unable to speak up at the meeting.

You should also consider whether you have all the facts you'll need to manage the discussion. Remember, we are now working on the third step in the CASES approach, "SYNTHESIZE the Information." By the time you are considering having a formal meeting, you should have already talked to key participants, gathered basic facts, and reviewed relevant ethics knowledge. That information helps you decide whether to hold a formal meeting, *not* vice versa. A formal meeting is *not* an occasion for data gathering.

CLICK.

Slide 8

Planning

Once you have determined to hold a formal meeting:

2. Set goals.
3. Select participants.
4. Contact key participants.
5. Schedule meeting; invite all participants.

NOTE: As you cover steps 2–5 on the handout, point out where participants' answers on the flip chart or whiteboard correspond to the steps.

SAY:

After you have decided to hold the meeting, you determine your goals for the meeting.

It is essential that you know what you want to get out of the meeting. Do you want to try to resolve the entire consult? Is that possible at this stage of the consultation process? Or do you want to achieve something more modest, such as making sure that everyone has the same information or opening lines of communication and re-establishing trust?

NOTE: You will be sharing the goals with participants, so you should describe them in words that everyone will understand. Check the flip chart or whiteboard for pertinent comments on goals from the play.

Once you know what you want to get out of the meeting, you will have a good idea who should attend. When selecting participants, you need to ensure that you have all the relevant parties while not overwhelming the patient or the family by having too many staff at the meeting.

NOTE: Check the flip chart or whiteboard for pertinent comments on participant selection from the play.

Your next step is to contact key participants to explain the purpose of the meeting and, as needed, to consult with them about inviting others. For example, they may help you determine which family members should attend and how to reach those parties.

NOTE: Again, check the flip chart or whiteboard for pertinent comments on participant selection from the play.

Finally, the consultant needs to schedule the meeting and invite participants. Administrative support may be available to the ethics consultant for some of these procedures, but as our play demonstrated, the responsibility for ensuring that the meeting is well coordinated rests with the ethics consultant.

CLICK.

Slide 9**Preparation**

- Review your notes.
- Practice introducing yourself as the ethics consultant.
- Anticipate questions and how you might address them.

SAY:

Preparation for a formal ethics consultation meeting also involves getting yourself ready for the meeting.

For example, before the meeting begins, you need to be on top of the facts and the relevant ethics knowledge.

It's a good idea to practice what you will say, to a mirror or to a colleague. You should also think about questions that are likely to be asked and how you will answer them.

ASK:

Does anyone have anything to add to the planning and preparation guidelines we have just covered? In your experience, are some of the guidelines especially important?

ELICIT ANSWER(S): Have 1 or 2 participants share their thoughts.

CLICK.

Slide 10**Starting Off Right: Self-Assessment**

Prior to the meeting	Almost Never	Occasionally	Frequently	Almost Always
Review the information you have gathered.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Practice explaining your role as the ethics consultant.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Think through the challenges you may face in the meeting and how you may respond to them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Print copies of the Ground Rules to bring to the meeting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seating arrangements	Almost Never	Occasionally	Frequently	Almost Always
I allow participants to determine seating on their own. (Watching where parties sit will often give the ethics consultant information about connections and aversions.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I encourage seating arrangements whereby the patient or family member sits next to those members of the treatment team with whom they have the best rapport, or to break up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SAY:

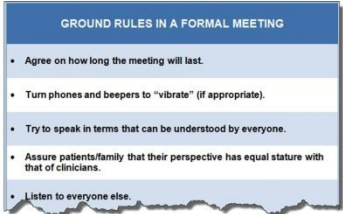
So, you have planned and prepared carefully, and now the meeting is beginning. What do you do to ensure that it gets off to the right start?

Please turn to **Handout 6.3: Starting a Formal Ethics Consultation Meeting—Self-Assessment**. It suggests a series of steps to keep the meeting on track and help defuse conflict in the first minutes.

As you see, the handout is in the form of a self-assessment. You are not required to report your results, so be honest with yourself. Please begin now.

NOTE: Allow a few minutes for participants to finish the self-assessment. When almost all show signs of being done, move to the next slide.

CLICK.

<p>Slide 11</p> <p>Starting Off Right: Self-Assessment Discussion</p> <ul style="list-style-type: none"> • Which steps do you do well? • Which steps do you still need to master? 	<p>SAY:</p> <p>Of course, getting a formal ethics consultation meeting off to the right start is a complex process. It takes time for you to master and incorporate all of these steps into your practice.</p> <p>ASK:</p> <ul style="list-style-type: none"> • Which steps do you do well? • Which steps do you still need to master? <p>ELICIT ANSWER(s): Acknowledge responses as part of a give-and-take with the audience.</p> <p>SAY:</p> <p>Please remember that these processes are not necessarily linear. For example, you may have to remind parties to follow the ground rules, even though you reviewed them at the beginning.</p> <p>CLICK.</p>
<p>Slide 12</p> <p>Ground Rules</p> 	<p>SAY:</p> <p>You may have noticed that ground rules are referenced but not listed in the self-assessment. If you turn to the last page in your handouts, you will find a table titled, “Ground Rules in a Formal Meeting.” This is intended as a take-home tool, ready to be reproduced and shared with members of your team. You might find it useful to make copies and place them around the room or hand them out before each formal meeting.</p> <p>Please take a moment to review the table.</p> <p>ASK:</p> <p>Are there any ground rules you would add or remove from this list?</p> <p>ELICIT ANSWER(S): Answers will vary.</p> <p>CLICK.</p>

4. “Elevator Speech” Activity (30 minutes)

Slide 13

“Elevator Speech”



SAY:

We’re now going to focus on a key skill that you can use not only in starting a formal ethics consultation meeting but whenever you introduce yourself professionally. It is, “Explain the ethics consultant’s role.”

ASK:

How many of you have struggled at one time or another to explain what you do as an ethics consultant?

ELICIT ANSWER(S): Count the raised hands and share your findings.

SAY:

What you do as an ethics consultant is probably mysterious to a lot of people, and even if they’ve heard of your role, they may have misconceptions about it. You can quickly educate people—and preempt their misconceptions—by developing an “elevator speech.” We use this term because such a speech can be delivered in the time you are traveling with someone in an elevator (i.e., 30 to 60 seconds).

In a formal ethics consultation meeting, you may have more control over your time, but unless you introduce yourself clearly and quickly, participants may ignore you and launch into talking about their concerns or, worse yet, someone else may try to run the meeting.

CLICK.

Slide 14

Group Activity Instructions Handout 6.4

Individually

1. Develop first draft of elevator speech.
2. Try out speech silently, and time it.

In groups of 4 or 5

1. Assign timekeeper.
2. Read speeches in turn—no critique.
3. Discuss what worked well in speeches.
4. Rework individual speeches. Plagiarize!
5. Choose volunteer to share with large group.

NOTE: Display this slide throughout the activity.

SAY:

We are going to do an activity that will help you script your speech and practice it.

You will first work individually and then in small groups. Later, some of you will have the opportunity to practice your speech with a cast member of “Murphy’s Law” and the rest of the audience.

We will be using **Handout 6.4: “Elevator Speech” Activity**.

ACTIVITY: Elevator Speech Activity (Refer to Handout 6.4)	
Groups	Assemble participants into groups of 3 or 4.
Time	10 minutes for individual work 15 minutes group work 5 minutes to debrief with the large group Total: 30 minutes
Before the Activity: Give the following instructions	<p>SAY: Please turn to Handout 6.4. Let's look at the steps you will follow during this activity.</p> <ol style="list-style-type: none"> Working individually, you will write a first draft of an elevator speech using pages 1 and 2 of Handout 6.4. Your speech should be general enough to work with different audiences in a variety of settings. Time yourself to make sure your speech is no longer than 60 seconds. <p>You will have 10 minutes for this portion of the activity. Once you have your first draft, you will begin working as groups.</p> <ol style="list-style-type: none"> Assign a time keeper. Each person will have 1 minute to try out their speech in front of the small group. Listen carefully so you can provide specific, constructive feedback to each other after everyone has had their turn. When everyone has finished sharing, take a few minutes as a group to provide positive and specific feedback to each other. Each member should receive at least one positive comment about an aspect of their speech that worked particularly well, along with at least one concrete suggestion for how to improve their speech. Revise your speeches individually using the feedback you've received and the insights you've gained. Record your second drafts on page 3 of the handout. Consider who in your group might be the best representative to recite their speech in front of everyone as part of the next exercise. <p>You will have 15 minutes for this portion of the activity. You may get started.</p>
During the Activity: Monitor	<p>Circulate, listening to make sure that groups are not being too critical and are staying on topic and on time. If you hear groups going astray, gently intervene to get them back on track.</p> <p>At 8 minutes into the exercise, tell participants they have 2 minutes left to complete their draft speech.</p> <p>At 10 minutes help participants transition into small groups.</p> <p>Call time when participants have 5 minutes left to rework their speeches.</p> <p>Call time when the full 25 minutes are up, and bring participants' attention back to the whole group.</p>
Following the Activity:	Remind participants that it is not easy to write an elevator speech—and it isn't easy to practice first drafts in front of other people. Ask participants if

ACTIVITY: Elevator Speech Activity (Refer to Handout 6.4)**Debrief**

they have any questions or comments about the small-group process. Respond to questions and comments.

Then, ask 4 volunteers to prepare to read their speeches to the large group. These should be the people that the groups earlier designated at their representative(s). Once the next activity begins, they will be cued to share.

CLICK to move to the next slide.

Slide 15
Activity: Murphy's Law Reprised
 Handout 6.1

Dr. Paula Pierce takes control of the meeting.

- Who will play Sonia? (confused)
- Who will play Lamar? (mouthy teenager)

SAY:

Let's go back to Dr. Paula Pierce's meeting, and give her another chance to start it off right.

Everyone, please turn back to **Handout 6.1**, page 3. We need 2 actors, 1 to play Sonia and 1 to play Lamar. Who has talent at acting confused (i.e., Sonia)? Who can act like a mouthy adolescent (i.e., Lamar)?

NOTE: Get volunteers who didn't play these roles in the first run of Murphy's Law.

We will do 4 reprisals of Murphy's Law, up to the points where Paula could have taken charge of the meeting by giving her elevator speech.

In the first reprisal, Sonia will speak her opening line, "Are you my grandfather's doctor?" and a brave volunteer from this group will respond with his or her elevator speech. Who is willing to give it a try?

NOTE: Volunteers should have been chosen at the end of the group activity. Select 1 of them to share now.

Have Sonia and the speechmaker stand up and look at each other. They don't have to move to the front of the room if they are visible to the audience. Cue Sonia to speak her line, and listen attentively to the participant's elevator speech. Lead a round of applause afterward.

Ask for another volunteer to play the ethics consultant. In the second round, have Lamar speak his first line, "Well, who's in charge, then? Who is running this meeting?" Repeat the activity, as above.

Ask another 2 volunteers to participate and repeat the sequence, so that 4 participants will have had a chance to give their elevator speeches to the whole group.





SAY:

Unfortunately, we don't have time to give everyone here the

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	<p>opportunity to practice with Sonia and Lamar. However, everyone should create opportunities to practice—with colleagues and anyone who's willing to listen for a minute and tell you if they understood what you said. The more you practice, the more comfortable you will be in explaining just what you do as an ethics consultant.</p> <p>CLICK.</p>
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5. Takeaways (5 minutes)

<p>Slide 16</p> <p>Takeaways</p> <p>Getting off to the right start in a formal ethics consultation meeting</p> <ul style="list-style-type: none"> • Planning and preparing effectively for the meeting • Opportunities to improve • A clear and succinct description of the ethics consultant's role 	<p>NOTE: This slide is animated.</p> <p>SAY: Let's spend a couple of minutes here at the end of Module 6 to reflect on what you will take away from this session.</p> <p>ASK: What struck you as most important for your work as an ethics consultant?</p> <p>ELICIT ANSWER(S): Answers may include any responses participants make. Take 2 or 3 responses, and as many more as time allows. Acknowledge each response.</p> <p>SAY: We have touched upon many concepts in this module. Hopefully, you have the materials you need to bring them all back to mind when you return to the job. Here they are, summarized.</p> <p> CLICK to fly in the summarized concepts.</p> <p>CLICK.</p>
<p>Slide 17</p> <p>Questions</p> <p>Questions?</p> <p>  </p>	<p>NOTE: Answer any questions and conclude the session with appreciation for the work participants have done and anything you want to say about your experience of the time you have spent with them.</p>